
Restaurant Pro Express Mobile v1.0

Usage Guidelines & Best Practices



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The following set of guidelines and best practices has been developed for business owners to enforce proper usage of the Restaurant Pro Express Mobile (RPE Mobile) add-on. This software is used in conjunction with the Restaurant Pro Express Point of Sale system.

Please make sure to educate the staff that will be using this integration, on the proper usage in-order to insure the most streamlined customer processing experience.

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Mobile Credit Card Payments

How do I correctly close a transaction to credit card using RPE Mobile?

Note: Before *proceeding* you must make sure that the transaction to be closed using RPE Mobile, is not opened on any of the Restaurant Pro Express POS terminals or other mobile devices. This insures that the invoice being processed in RPE Mobile, is displaying the most current invoice total.

When ready to make payment:

1. Press the red **“Pay Invoice”** button located in the lower middle of the RPE Mobile invoice screen.
2. When the Amount Due screen appears, press the **“Credit Card”** button.
3. You will be asked if you wish to split the transaction, select either **“Yes”** or **“No”**.

Note: If **Yes** is selected, you will be asked for the number of credit card splits. You will then be asked which split to close out.

4. After you have made your selection RPE Mobile will open the Innerfence CC Terminal application, to finish processing the transaction.

Note: The staff members using RPE Mobile must **NOT** change the charge amount (Subtotal) inside in the CC Terminal application. Please make all staff members aware of this.

5. If the CC Terminal application has been enabled to accept tips, staff members can rotate the iPod/iPhone device to have the customer enter a tip value. Pre-configured tip percentages can be selected as long as they have enabled for RPE Mobile.
6. Enter the credit card number and expiration date by swiping the credit card through the Magnetic Swipe Reader (MSR) attached to the iPod/iPhone device. If no MSR is attached to the iPod/iPhone device you can manually enter the credit card number and expiration date.
7. Press the green **“Charge”** button.
8. If the charge is successful, you will see a message.
For Example:

Approved \$33.00
VISA xxxxxxxxxxxx1111

9. Tap the screen which will return you to RPE Mobile where you can choose to print or email the receipt.

The invoice is now closed.

Mobile Credit Card Payments

How do I correctly void a transaction closed to credit card using RPE Mobile?

On the mobile device that performed the mobile credit card transaction:

1. Press the iPod/iPhone Home button.
2. Open the **CC Terminal** application.
3. Press the back arrow titled **“Log”** located in the top left corner.
4. Locate the charge amount you wish to void. The transaction can be found by looking at the amount, last four digits of the card number, date that the transaction was processed and if the transaction was process today, you can also search by time.
5. When you have located the charge to be voided, select the transaction from the list.

Note: You can confirm this is the correct transaction to void by looking at the bottom of the transaction overview screen and searching for the Invoice number. The invoice number displayed there will match the invoice number from the Restaurant Pro Express desktop application.

6. In the top-right corner of the screen, press the small icon that has an arrow located in the middle of an outlined box.
7. Press the red **“Refund”** button.
8. The terminal will be shown on screen. To finalize the refund press the green **“Refund”** button.
9. The CC Terminal will now show the transaction as **“Voided”** and the amount that was refunded.

On any available Restaurant Pro Express POS desktop station:

1. Login to RPE on the station then select the **Options** or **Manager** button.
2. Select **Cashier**.
3. Press **Recall Invoice**.
4. Locate the same invoice that you voided on the mobile device. After locating the invoice hit **Select**, the invoice will then be displayed on screen.
5. Select the **Void** button.

The invoice has now been voided in both the RPE and the CC terminal application.

Invoice Hand-Offs

How do I correctly transfer (or hand-off) an invoice created using a RPE Mobile device to a RPE desktop POS station?

If you wish to transfer the tab from the mobile device to the POS terminal stations please do the following:

On the mobile device that opened the transaction:

1. Press the blue **“Save”** button located in the top-left corner of the mobile invoice screen. This will insure the invoice has been fully updated with the POS.
2. Press the **“Home”** button located in the bottom-left corner of the application. This will insure that the transaction is not being opened and/or edited on two stations at the same time.

On any available Restaurant Pro Express POS desktop station:

1. Login with your employee ID and password, or swipe your card if available.
2. Open the invoice:
 - If using the table-layout mode, you will see the open table (shown in green). Select the open table to open the invoice and continue making the necessary changes to customer’s tab. You can continue editing the invoice and accept payment from the POS station if necessary.
 - If using the RPE Mobile **“Custom Names”** feature you can select the **Open Tabs** button located above the table layout screen. There you will see the name of the tabs that were created in RPE Mobile. Select the name of the invoice you would like to edit, and the invoice will appear on the RPE invoice screen. You can now continue to edit and process the invoice.
 - If using RPE desktop in Quick-Service mode you can press the **Manager/Options** button, then select **Recall On-Hold Invoice** from the **Cashier** section. You can then select the invoice you wish to open and continue editing/processing.
 - To make the process smoother, you can configure a touchscreen hot-button from the **Touchscreen Configuration** window of the RPE desktop station. This window is accessed from the **Manager/Options** screen under the **Setup** section. Activate the **Recall On-Hold Invoice** hot-button feature for the button you would like to configure.

The transfer from RPE Mobile to the RPE desktop POS station is now complete.

Invoice Hand-Offs

How do I correctly transfer (or hand-off) an invoice created using a RPE desktop POS station to a RPE Mobile device?

If you wish to transfer the tab from a RPE desktop POS station to a RPE Mobile device please do the following:

On any available Restaurant Pro Express POS desktop station:

1. *Create a new order in RPE on a desktop POS station. This can be accomplished by one of the following methods:*

If using Fine Dining with table service:

- *Select a new table from the table layout screen then add items to the invoice.*
Or
- *Select the **Open Tabs** button above the table layout screen then select **New Tab**, then add items to the invoice.*

If using Quick Service Restaurant:

- *Login to the restaurant invoice screen then add items to the invoice.*

2. *Place the invoice on hold:*

- *Select the blue **CHECK** button. This will print a receipt of the invoice and place it on hold.*
- *Select the red **SEND** button. This will place the invoice on hold and if applicable will send a printout to the kitchen for preparation.*

3. *Depending on how RPE POS desktop has been configured, you will either be asked to enter a name for the tab, or the tab will automatically show as active on table layout or under the Open Tabs section.*

4. *As a security measure, you should now log-out of the RPE POS desktop station. The system can also be configured to automatically log-out of the RPE POS desktop station based on the amount of time that the system has been inactive.*

On an available mobile device running the RPE Mobile application:

1. *Login under the same employee id used to create the invoice on the RPE POS desktop station.*
2. *Press the “**Open Invoices**” receipt icon located in the bottom right corner of application.*
3. *Select the name or table number of the invoice created on the RPE POS desktop station.*

The transfer (hand off) is now complete from the RPE POS desktop station to RPE Mobile.

Invoice Hand-Offs

Can the same invoice be open on both RPE Mobile and the RPE POS desktop station at the same time?

This is not a recommended practice, as RPE Mobile and RPE was not designed to operate like this.

As mentioned earlier in this document, you must make sure that the transaction that you wish to edit/process is not open on any of the other terminals or mobile devices. This insures that the invoice which is currently opened (on either RPE or RPE Mobile) is displaying the most current invoice total.